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FinancialPlanning

Wealthtech Weekly

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By Rob Burgess
Reporter

In the latest "Show Me Your Stack," I spoke with Tushar Kumar of Twin Peaks Wealth Advisors. (You may remember him from my recent story about family businesses, as he founded the firm with his identical twin brother Vishal.) He told me about the importance of integrating tax and estate planning into their tech stack, along with traditional financial planning.

Does your firm's tech stack include tax planning? Let me know — robert.burgess@arizent.com.

I hope you'll check out this article, along with the rest of this week's stories.

As always, thank you for reading. Talk to you next Thursday!

Connect with Rob:

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TOP STORIES

SHOW ME YOUR STACK

'Taxes are part of everything': Show Me Your Stack

Along with traditional financial planning, Tushar Kumar includes estate and tax planning services at his firm in order to give clients, especially high net worth ones, a complete picture.

- **Passion in the portfolio: Luxury collectibles as alternative assets**
  Wine, whiskey, cars, handbags, guitars and watches are loved by many clients. And they may be worth serious money, too.

- **New client communications tool includes AI-powered compliance checks**
  Co-founded by four Orion veterans, new wealthtech startup Hamachi.ai seeks to embed AI-powered compliance into client communications.
- **ADVISE AI: Get ahead of the curve on AI innovation**
  Financial Planning's second annual ADVISE AI conference, taking place Oct. 28-29 in Las Vegas, will delve into how the emerging technology continues to revolutionize the industry.
- **As economic optimism hits 3-month high, shutdown worries loom**
  In this month's Financial Advisor Confidence Outlook, advisors' feelings about the overall economy and practice performance were up. That optimism could be fleeting.

Read the latest in Wealthtech

PARTNER INSIGHTS FROM EQUITABLE ADVISORS

Maintaining firm autonomy when sharing technology, people and processes

In this Q&A article with David Karr, chairman of Equitable Advisors, gain perspective on how financial advisors can leverage shared resources and lean into AI to more efficiently.

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